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# Lawn&Garden Marketing

NOV/DEC 1986

## Reports on: NLGDA convention

## Summer product movement • 1987 events

## Market Data Issue

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# Lawn&Garden Marketing

*The merchandising magazine for lawn, garden and leisure living products.*

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### Market data issue

Our annual issue kicks off with some early results from the National Gardening Survey, which indicates the continued importance of U.S. household growth to the lawn and garden industry. This is followed by two first-time studies: a survey of consumers on the value of landscaping and a profile of independent garden centers. Also included is the latest information on power and portable power shipment data, foliage grower reports and casual furniture sales.

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# L&G participation strong in '86

**Results from the annual National Gardening Survey show U.S. household involvement in lawn and garden activities at steady or increased levels; two new categories of activities measured this year.**

**By Bruce Butterfield**

Early results of the 1986 National Gardening Survey indicate that participation in every category of indoor and outdoor lawn and garden activity by U.S. households this year was equal to or greater than participation rates seen in 1985. The survey is conducted annually for the National Gardening Assn. by the Gallup Organization Inc.

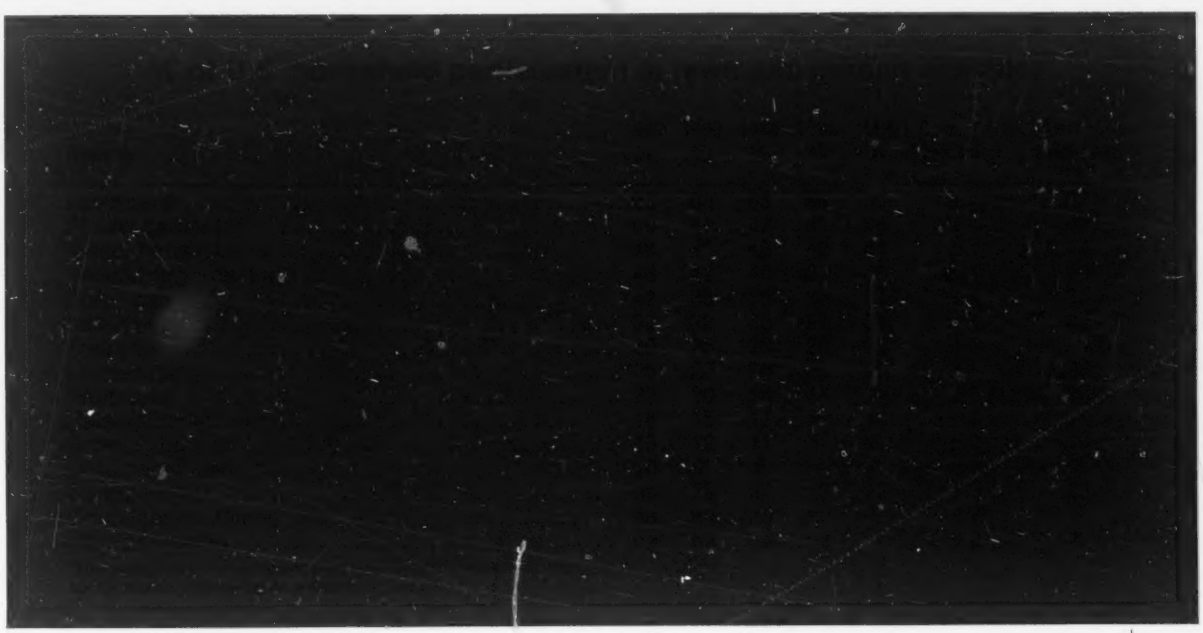
Of the 15 categories of DIY lawn and garden activities measured in 1986, 10 had participation rates equal to that seen in 1985, three saw an increase in participation; two categories, herb gardening and container gardening, were measured for the first time.

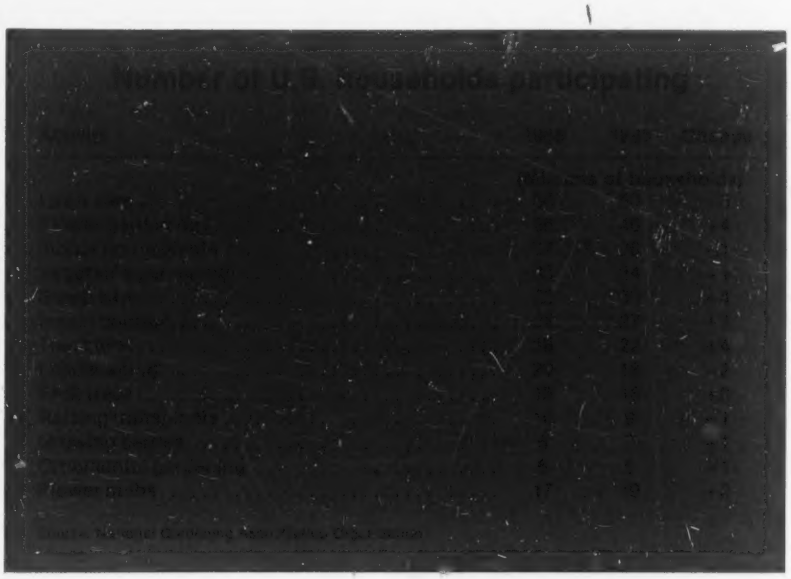
The percentage of U.S. households participating in lawn care, maintaining indoor houseplants, shrub care, insect control, landscaping, planting flower bulbs,

raising transplants, vegetable gardening, growing berries and ornamental gardening were all statistically equal given sampling tolerance to participation rates seen last year. Categories of flower gardening, tree care and fruit trees saw a small yet significant increase in participation levels over 1985.

According to Charles Scott, president of the NGA, "The early results of this year's survey have confirmed that gardening in its many forms is an important part of Americans' lifestyles and values. The fact that some lawn and garden activities with small declines in 1985 rebounded in 1986 suggests that we are on solid ground. On balance, I think that 1986 was a year when the lawn and garden market stabilized."

Scott continued, "Given the economic and demographic outlook for 1987, we expect next year to show some real growth. The lawn and garden industry has not yet felt the full impact of this year's improved housing market. I also suspect that the increasing sophistication of America's gardeners will be an important factor in the future."





### Household growth continues through '80s

From 1980 to 1985, the U.S. household population increased from 80.8 million to 87.9 million or an increase of about 9 percent. From 1986 to 1990, the U.S. household population is expected to increase from 88.4 million households to an estimated 99.1 million households or an increase of about 12 percent.

Given the age structure of the U.S. population, the number of households will increase at a much higher rate than the number of people in the United States between now and the end of this decade principally because the baby-boom generation has entered its prime years for household formation.

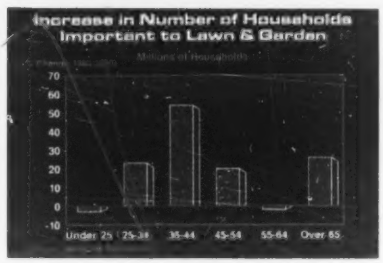
During the 1980s, the total number of U.S. households is expected to increase by more than 20 percent, while the total number of people in the United States is expected to increase by only about 10 percent.

Between 1980 and 1990, the number of households age 35 to 44 is expected to increase by 54 percent, households age 65 and older by 26 percent, households age 25 to 34 by 23 percent and households 45 to 54 by 20 percent. All of these household age groups can add significantly to the lawn and garden customer base.

### Increase in number of households important

From 1985 to 1986, the U.S. household population increased by an estimated 500,000 households from 87.9 million households in 1985 to 88.4 million households in 1986.

What this meant for the lawn and garden industry was that even though




the percentage of all households participating in most types of lawn and garden activity did not increase this year, the actual number of households did. In fact, when you compare the estimated number of households that participated in each type of lawn and garden activity in 1986 with 1985, you find that for a majority of eight out of 13 activities measured both years, the number of participating households increased in 1986.

The number of households that participated in flower gardening, tree care or shrub care in 1986 increased by an estimated 4 million households each from 1985. Household participation in insect control and growing fruit trees increased by an estimated 3 million households each during the last year.

The number of households that planted flower bulbs increased by 2 million households and the number of households with a vegetable garden or growing berries each increased by an estimated 1 million households from 1985 to 1986.

This year as in the past, the annual growth in the number of U.S. households was more important to increasing the consumer base for lawn and garden retail sales than a change in the percentage of households participating.

### Who's who of today's lawn and garden participants

During the past few years the demographics of who's who of lawn and garden participants have been changing. The most avid participants in lawn and garden activities and the primary target groups for sales of products and information today are younger, better educated, more affluent, located in the suburbs and have professional, managerial or business related occupations.

Because they are younger, they are strong DIYers. As college educated, they buy intelligently, ask questions and expect detailed answers. They want to buy quality and expect value in their lawn and garden purchases, because they earn large salaries and have adequate disposable incomes. As professional and business people, they're concerned with a proper and fashionable image that reflects their achievement and status.

Today's key lawn and garden participants have a general idea of how they want their property to look; appearance is important. They enjoy working in their yard and are results-oriented. They are busy people so lawn and garden activities need to fit with their other lifestyle interests.

Because a majority of today's lawn and garden enthusiasts are married, the planning, purchasing and involvement in lawn and garden activities are typically shared responsibilities. Regional and local preferences, new plant and product introductions, time and labor saving gardening and yard maintenance techniques are also all important parts of today's retail lawn and garden marketing mix. **—LGM**

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Bruce Butterfield, author of this article, is director of research for the National Gardening Assn.

Each year NGA publishes the National Gardening Survey based on research conducted by the Gallup Organization. The Survey looks at U.S. household participation in lawn and garden activities, how much consumers spend, products purchased and other related subjects of interest.

The NGA is a member-supported, non-profit organization with headquarters in Burlington, Vt. Its 250,000 members receive the organization's monthly magazine National Gardening, which, in addition to providing gardening information, permits members to exchange ideas and inquiries through its pages. The organization also offers a Gardening Answer Service managed by staff horticulturalists.

In addition to its magazine, NGA also recently published a 430-page book, *Gardening—The Complete Guide to Growing America's Favorite Fruits and Vegetables*, is involved in the production of a series of how-to video-tapes on gardening and is developing elementary science educational programs using gardening as a hands-on learning tool. NGA's address is 180 Flynn Ave., Burlington, VT 05401.

Next month, Butterfield will discuss 1986 lawn and garden retail sales and trends in lawn and garden product purchases.

# Landscaping: Adding value to America's homes

**According to a Gallup survey, homeowners are enjoying the aesthetic rewards of landscaping today while investing in its financial rewards for tomorrow.**

By Bruce Butterfield and Charles W. Dunn

All across this country we've seen recently a resurgence in America's housing industry. In many areas, building permits are at a 10-year high while interest rates have fallen to a 10-year low. Unemployment and inflation are down while consumer confidence, pride and a sense of personal well-being apparently are riding a crest of popularity.

The millions of baby boomers are just beginning to turn 40 and are entering their prime home-investment years. Their purchasing decisions are unlike those of any other generation. Greater emphasis is placed on the value received or perceived when a purchase is made.

All of this will have a tremendous impact on the lawn and garden industry. It will force many of us to adopt new methods and techniques of selling—ones based on value, because America's homeowners have discovered the value of landscaping.

It has not happened overnight. For the past several years, the average amount of money that homeowners spend annually on landscaping their property has been higher than their spending on lawn care, flower gardening, vegetable gardening and virtually every category of DIY lawn and garden activity. Landscaping represents an important part of today's lawn and garden market, both directly in terms of sales of trees, shrubs, plants and seed, and indirectly in terms of sales of fertilizer, insect controls and chemicals, tools, power equipment, watering equipment, information and other related lawn and garden products.

To find out exactly what value America's homeowners associated with their landscaping, the Weyerhaeuser Co.'s Nursery Products Division funded research during 1986 to determine how both U.S. homeowners and real estate professionals view the value of landscaping. This research included inquiry into both the qualitative and quantitative aspects of the value of residential landscaping, an investigation of who the key landscaping customers are today and how real estate appraisers and professionals view landscaping in terms of enhancing sales appeal and the bottom line in marketing real estate.

### Plants enhance the quality of life

Arborists, landscape architects, nurserymen and horticulturists have long recognized the importance of plants. Professionals from a number of other disciplines—psychologists, meteorologists, architects and geographers—are now looking at and studying what plants add to the quality of man's life and are proving what had been assumed previously.

Dr. Roger S. Ulrich of the department of geography at the University of Delaware, for example, has done extensive research on the basic emotional response of people to plants. Through a series of detailed artists' drawings, urban row homes were presented to a panel in various stages of landscaping and with various signs of structural neglect, such as peeling paint or broken windows.

"In the case of the systematically degraded scene, step-by-step removal of vegetation reduced the aesthetic appeal more than did the step-by-step deterioration of the structure," Ulrich reported.

According to Toronto psychiatrist Dr. Basil Orchard, "For most people, trees and plants convey warmth, hospitality, protection and serenity. They convey the ability to endure adversity and survive, serving as powerful living examples of continuity and stable growth in the everchanging and relatively unstable environment that mankind faces."

Quality of life is an important attribute in the value/purchase decision concept.

Yankelovich, Skelly and White Inc., one of America's leading forecasters of social change, recently completed a report on "How Changing Lifestyles in America are Impacting the Gardening Industry" for *Rodale's Organic Gardening*. This report notes that "gardening will to some degree benefit from the renewed emphasis on home-base leisure, and that this will extend to vegetable, ornamental, lawn care and flower/plant cultivation. The character of leisure time is changing, and many of the changes are in directions that suggest vitality for gardening."

The study reports that in 1985, 35 percent of the people they surveyed said that "having a beautifully landscaped or exceptionally well cared for lawn and garden is associated with success"—an increase of 5 percent from 1984.

The benefits that plants offer to mankind are just beginning to be measured. The interactions that humans have with their environment are just starting to be appreciated. Over the last decade, the emphasis has shifted from broad generalizations about our relationship with plants to more closely identified specific benefits of man/plant interaction. As we learn more about the "hows" and "whys" of this fundamental and intricate relationship, we begin to determine the true value of plants—a value that is a combination of emotional factors and economic reactions.

### The economic value of landscaping

While few would question the fact that landscaping and plants add to the quality of life, are aesthetically pleasing, promote a sense of well-being, convey status and make our home and work environments more liveable, it is important to quantify or measure exactly how much landscaping is worth in more tangible and concrete terms. In developing "The Value of Landscaping" for Weyerhaeuser, the Gallup Organization Inc. of Princeton,

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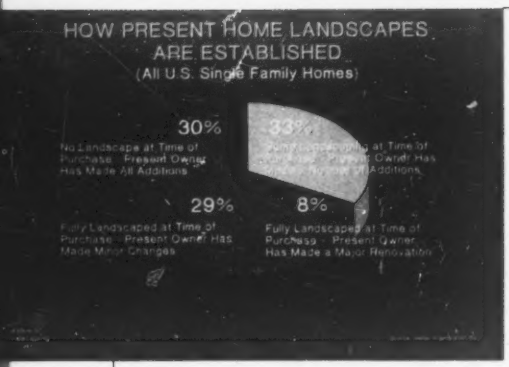

HOW PRESENT HOME LANDSCAPES ARE ESTABLISHED
(All U.S. Single Family Homes)
30%
No Landscape at Time of Purchase - Present Owner Has Made All Additions
33%
29%
Fully Landscaped at Time of Purchase - Present Owner Has Made Minor Changes
8%
Fully Landscaped at Time of Purchase - Present Owner Has Made a Major Renovation

## *Landscaping*

*...continued*

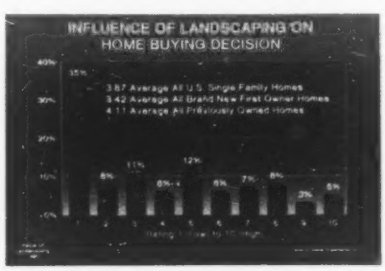
N.J., was engaged to interview personnally a representative sample of U.S. households in all 50 states, seeking answers to the following questions:

- How important is residential landscaping in influencing the buying decision to invest in one property rather than another?
- How does the investment in landscaping compare with investments in other types of home improvements, such as remodeling a kitchen or bath?
- How much does landscaping add to the selling price or value of residential property?
- How are today's home landscapes established?

### Landscaping as an influence in the home buying decision

Many factors and considerations go into the decision to select one home over another. Factors such as the land itself, the orientation of the lot, the structure of the house, the total square footage, the features of the house, the finish of the house and several other factors all influence one's decision when selecting a particular home. Given these influences, the fact that landscaping rated an average of 3.87 (on scale of 1 to 10, with 1 being low and 10 being high) nationally among owners of single-family homes suggests that landscaping does influence the home-buying decision.

The influence of landscaping on the home-buying decision was slightly higher for people buying previously owned homes (4.11) than it was for those purchasing brand-new homes (3.42). The reason for this difference is the fact that


INFLUENCE OF LANDSCAPING ON HOME BUYING DECISION
3.87 Average All U.S. Single Family Homes
3.42 Average All Brand New First Owner Homes
4.11 Average All Previously Owned Homes

60 percent of brand-new first-owner homes have no landscaping at all at the time of purchase and 20 percent of new homes have only minimal landscaping. Therefore, for 80 percent of brand-new homeowners, there was little or no landscaping to influence the buying decision. That compares to previously owned homes where 43 percent are fully landscaped.

For a majority of 71 percent of all households, the current homeowner has made a number of additions, done a major renovation or done all the landscaping that exists on the property. For only 29 percent of all households was the property fully landscaped and did the present owner make only minor changes.

Landscaping and re-landscaping is a continual and ongoing process as homeowners add to and change their existing landscaping as homes are bought and sold.

Overall, new home buyers and buyers of previously owned homes in the U.S. estimate that landscaping, on the average, adds 14.87 percent to the value or selling price of their home. This clearly indicates that American homeowners strongly feel that landscaping adds a significant value to their property.

HOW LANDSCAPING COMPARES WITH INVESTMENTS IN OTHER HOME IMPROVEMENTS
(All U.S. Single Family Homes)
17%
An Excellent Investment
38%
Not as Good an Investment

### American homeowners consider landscaping a very good investment

A majority of 62 percent of all U.S. homeowners feel that landscaping is as good as or a better investment than spending money on other types of home improvements such as remodeling a kitchen or a bathroom. Furthermore, these homeowners feel that landscaping holds its value compared to other kinds of remodeling, and it's the kind of investment that pays a very handsome return.

In fact, the April 1986 issue of *Money* magazine reported in a story on home renovations that "not all improvements will increase the value of a house by the amount that they cost to perform." Landscaping, according to the magazine's research, has a recovery value of 100-200 percent, "if it is done well and harmonizes with foliage nearby." This compares with a recovery value of a kitchen overhaul of 75-125 percent, a bathroom 80-120 percent, a new deck or patio 40-70 percent and a swimming pool 20-50 percent.

In summary, the 1986 Gallup National Landscaping Survey conducted for Weyerhaeuser's established the following quantitative factors regarding the value of landscaping.

- When people buy a home, landscaping is a definite factor they take into consideration in making their buying decision.
- Once a home is purchased, landscaping is an important ongoing activity.
- Homeowners feel that landscaping adds an average of about 15 percent to the value of their property and that landscaping is an investment with lasting value.
- Landscaping is an important factor for homeowners while they live in their homes, and it is also an important part of selling that home.

### Who's who of landscaping consumers

According to a recent National Gardening Survey, landscaping was the lawn and garden activity with the highest average annual dollar expenditure, $154 per participating household. With nearly one of four U.S. households (23 percent) actively engaged in landscaping activities—defined as the installation of new plant material, trees, shrubs, groundcovers and vines in new and renovated landscapes—cash registers at the retail level rang to the tune of $2.1 billion last year. This number does not include expenditures for lawn and garden activities such as pruning, fertilization, watering, weed control, lawn and tree care or flower gardening.

### Opportunities in today's lawn and garden market

Today's lawn and garden industry has a market of strong demographic characteristics, a revitalized housing industry of both new starts and existing home resales and a population in this country intent upon maximizing leisure-time activities. All of this points to an unparalleled opportunity for the nursery and lawn and garden industry. To take advantage of it, we have to sell our markets on the value of landscaping. We have to provide our markets with the products and services to meet not only the customers' interests, but to compliment their lifestyles. **—LGM**

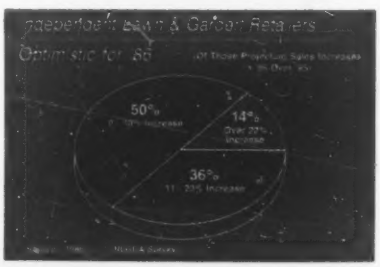
Bruce Butterfield is research director for the National Gardening Assn., Burlington, Vt. Charles W. Dunn is a marketing and communications consultant in Tampa, Fla., and specializes in the nursery, lawn and garden industry. Next month in *LGM*, the authors will address the subject, "How real estate appraisers look at the value of landscaping and the opportunities for the industry."

# Garden centers profiled

**A new marketing study with some surprising results gives a profile of a strong core of specialty retailers who are optimistic and growing stronger.**

A first-time study of the industry's specialists in selling tools, chemicals, fertilizers, supplies and green goods to the public shows that garden centers are strong and growing stronger.

The study, sponsored and underwritten as a joint project by *Lawn & Garden Marketing* and the National Lawn and Garden Distributors Assn., showed that the average annual sales per store by the independent garden centers was $876,680 per store. The average sales area per store was 7,400 square feet with 55 percent of them being indoor space and 45 percent being outdoor display space.




Two out of three of the respondents to the survey projected an increase in 1986 sales volume compared to 1985. On average, those who projected increases expected an increase of 15 percent. One half of them expected increases in a lower range: 11 percent.

The categories in which the garden centers expected to see the greatest 1986 increases were landscape services, lawn fertilizers and garden supplies. The most-frequently listed products that garden centers will add are garden supplies, nursery stock, lawn fertilizer and garden tools.

Breadth of inventory, rather than cherry picking, is a part of their marketing strategy, judging from the data provided by the garden centers. In other words, in general, if garden centers carry a category at all, they carried a full line of products in the category.

This is one of the strategies which distinguishes the garden center operators from the mass-merchandisers who are more inclined to cherry pick and stock only products with best margins and fastest shelf movement. One of the surprises of the survey was that the majority of the garden centers do not consider the mass-merchandisers but rather other garden centers as their major competition.

The best profit margins to retailers came from landscape services, nursery stock and trim-a-tree items. Garden supplies, nursery stock, lawn fertilizer and garden tools were the product lines most mentioned by garden center operators who plan to expand into new lawn and garden categories in the next three years.

Another surprise revealed by this survey was the relatively low inventories that the retailers reported for the end of the 1986 summer selling season, said Aaron Lessans, president of Commerce Distributors, Linthicum Heights, Md., and a member of NLGDA. He said the data prepared him for the low-inventory position of garden center operators who came to his dealer show in October.

One example, he said, was that orders placed by these retailers for Ortho products for the 1987 sales season were 47 percent higher at this year's dealer show than for orders placed during his 1985 dealer show. The increase, he said, was due to the low inventory position of the dealers and their optimism for the upcoming season.

The distributors who co-sponsored the survey of garden centers believe the new

*continued...*

## Sales by category, profit margin

| Product line | Percent Carrying | Percent of Sales* | Profit Margin* |
|---|---|---|---|
| Garden tools | 77% | 5% | 35% |
| Nursery stock | 76 | 23 | 46 |
| Lawn fertilizers | 75 | 12 | 32 |
| Soil amendments | 74 | 7 | 34 |
| Pesticides and other chemicals | 73 | 9 | 36 |
| Garden supplies | 73 | 11 | 35 |
| Watering products | 72 | 4 | 36 |
| Specialty fertilizers | 67 | 5 | 38 |
| Indoor plant related | 64 | 3 | 30 |
| Patio items | 64 | 10 | 36 |
| Miscellaneous | 46 | 17 | 39 |
| Trim-a-tree | 40 | 9 | 44 |
| Landscape services | 14 | 32 | 50 |

*Percentages are based on the number of respondents who carried the category.

Source: 1986 LGM/NLGDA survey.

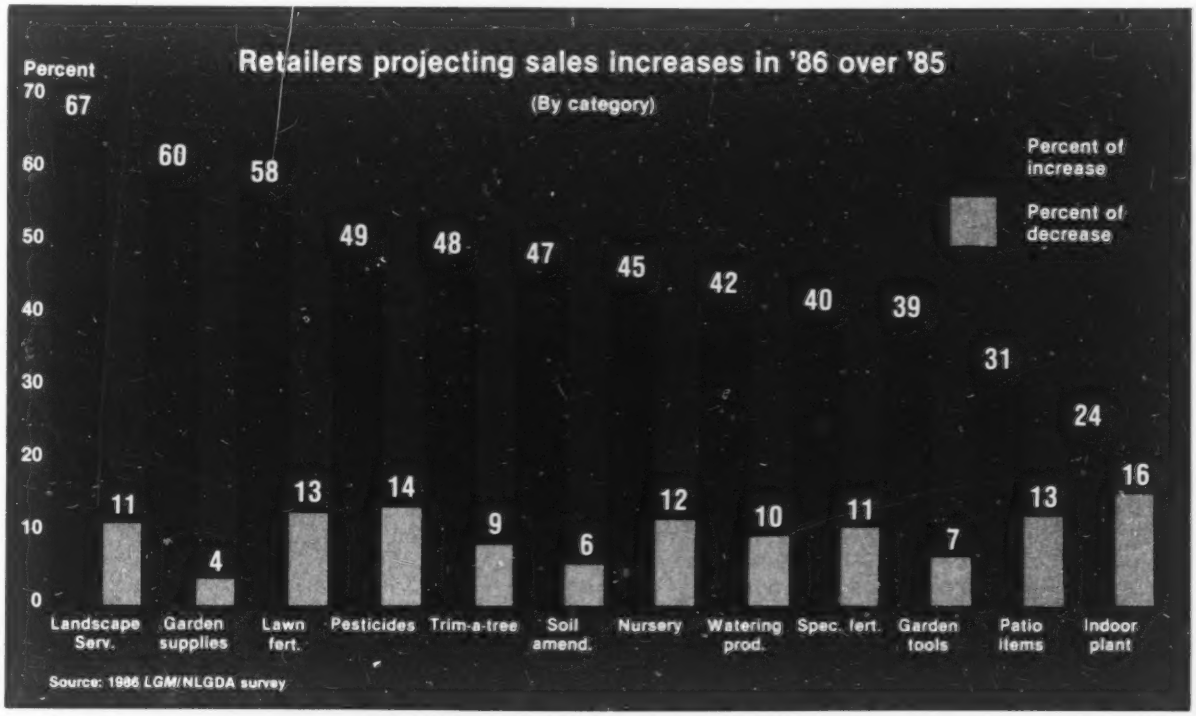
## *Garden centers*

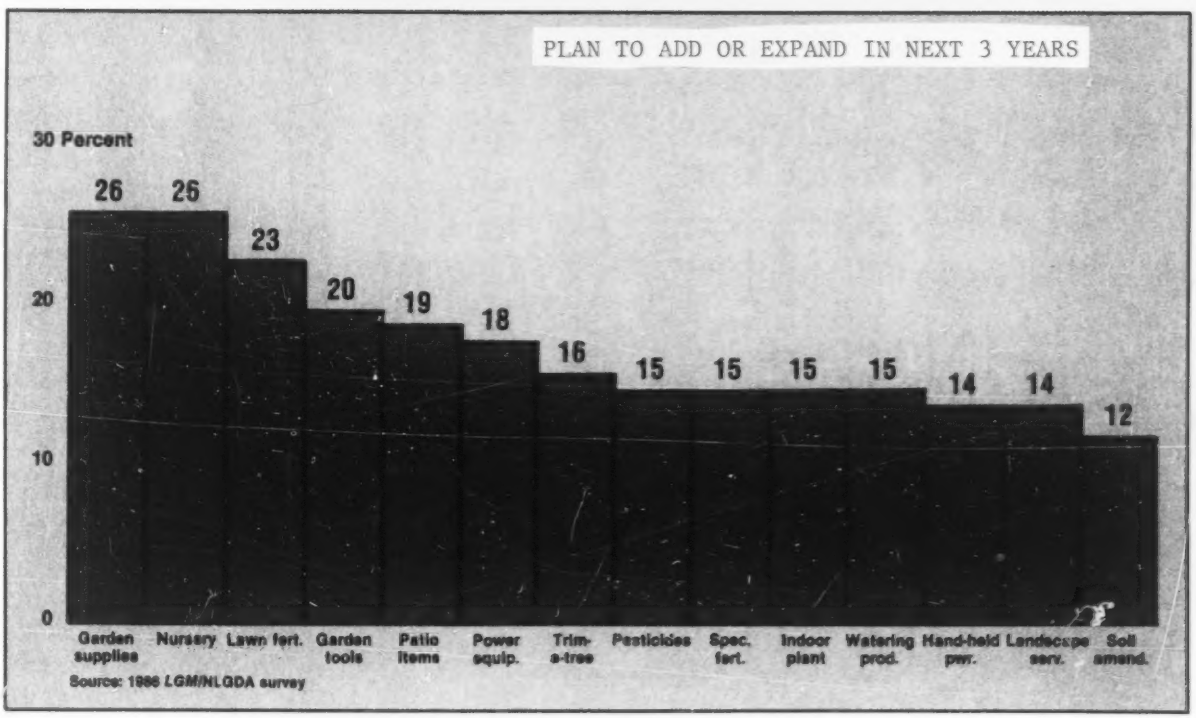
*...continued*

data gives them a better profile of these retail customers and will enable them to serve them better.

Additional data, including some surprising information that may encourage some distributors to change some previous assumptions and marketing strategies will be reported in upcoming issues of *LGM* in 1987. **—LGM**

This study was conducted as a joint effort of *Lawn & Garden Marketing* and the National Lawn and Garden Distributors Assn. Complete copies of the study are available for purchase by contacting William Robinson, NLGDA, 1900 Arch St., Philadelphia, PA 19103, (215) 564-3484.



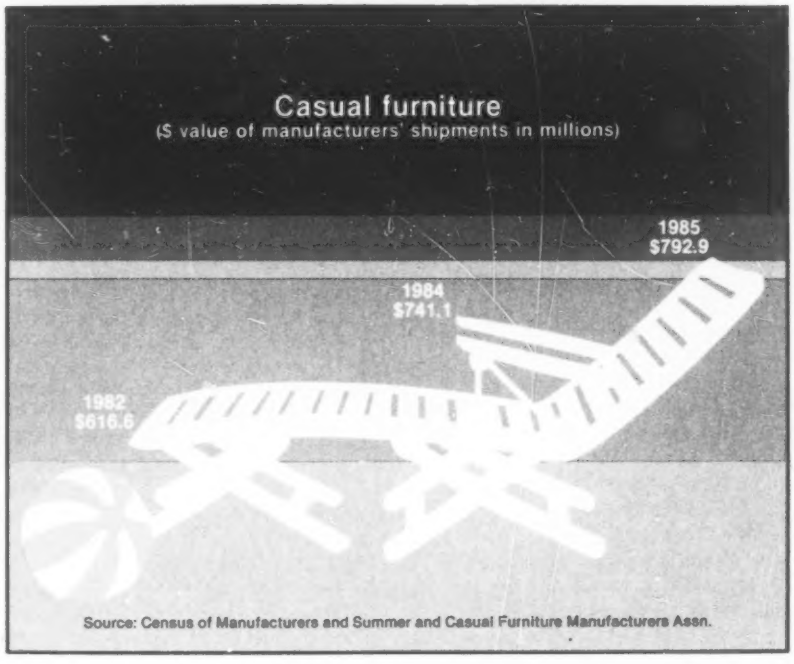
# Casual furniture still showing increase

The Summer and Casual Furniture Manufacturers Assn. (SCFMA) estimates that U.S. manufacturers shipped $729.9 million in casual furniture in 1985, up 7 percent from 1984.

The 7 percent growth is derived from a comparison with a revised mark for 1984 of $741.1. These figures are estimates of shipments, at manufacturers invoice value, from casual furniture manufacturers located in the United States and are the latest figures available. If imports were included, the total retail market for casual furniture would be about $1.5 billion, according to Martin J. Reddan Jr., director of market research for the American Furniture Manufacturers Assn.

Looking to the 1987 lines, Reddan says that the biggest innovation by manufacturers will be seen in the use of fabrics, "especially in looks and texture. Woven vinyls are a little more sophisticated than in the past."

A wider variety of colors will be available also, he says, although vanilla still leads in color preference among retailers.





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# Product Movement Report

# Summer 1986

The summer of 1986 appears to have been a strong sales season for lawn and garden retailers nationally. Of the nine categories measured in the Summer 1986 Product Movement Report, only one reflected a decrease. In the category of electric spin trimmers, more retailers reported sales down than up in 1986 compared to 1985.

Nationally more retailers reported substantial increases in 1986 over 1985 in all power equipment categories, including walk-behind mowers, riders/lawn tractors and gasoline-powered spin trimmers.

The South weighed heavily on the national totals, however, for garden tools because a significant number of Southern respondents reported decreased sales, causing the garden tool category to rate flat nationally.

Rodenticides, herbicides and insecticides were three categories in which a greater number of respondents reported more sales up than down. Watering equipment remained stable. More retailers reported sales up than down. The North Central states were the exception, reporting decreased sales there.

When asked the median number of walk-behind mower units in inventory per store on August 31, 1986, retailers reported a median of 19 units. This compares to 11 units in 1985.

The Southern region, as expected from its weaker economy, showed several categories with greater decreases than increases, including garden tools, herbicides and high ticket items such as riding tractors. The South showed stable sales of walk-behind mowers, however, and increased sales of gas-powered spin trimmers.

- **Garden tools:** 66 percent carry the line; 7 percent said sales were up; 39 percent said same and 20 percent said down;
- **Watering equipment:** 56 percent carry the line; 17 percent said sales were up; 27 percent said same and 11 percent said down;
- **Rodenticides:** 44 percent carry the line; 16 percent said sales were up; 21 percent said same and 7 percent said down;
- **Herbicides:** 56 percent carry the line; 9 percent said sales were up; 33 percent said same and 14 percent said down;
- **Insecticides:** 61 percent carry the line; 19 percent said sales were up; 31 percent said same and 11 percent said down;
- **Walk-behind mowers:** 54 percent carry the line; 20 percent said sales were up; 17 said same and 17 percent said down;
- **Riding mowers/lawn tractors:** 49 percent carry the line; 14 percent said sales were up; 17 percent said same and 17 percent said down;
- **Electric spin trimmers:** 43 percent carry the line; 10 percent said sales were up; 23 percent said same and 10 percent said down;
- **Gas spin trimmers:** 56 percent carry the line; 24 percent said sales were up; 16 percent said same and 16 percent said down.

Retailers in the Northeast reported strongest sales gains in power equipment. More retailers in this region said sales were up significantly in walk-behind

*continued...*

## Summer product sales changes

(% of respondents)

| | % carrying | % up | % same | % down |
|---|---|---|---|---|
| Watering equipment | 51 | | 24 | 13 |
| Electric trimmers | 50 | 11 | 27 | 12 |
| Walk-behinds | 67 | 29 | 24 | 14 |

Source: LGM summer 1986 survey.

Based on 262 respondents indicating sales changes in each product category compared to summer 1985. Percentages do not add up to 100 percent because not all the respondents carry all product lines.

Decreased sales in the North Central weighed down national totals; in three other regions, some credited increases to drip irrigation sales.

By all indications, electric trimmer sales remain flat while gas units are gaining.

As was projected, this category showed gains—even in the South, which reflected sales decreases in most higher ticket items.

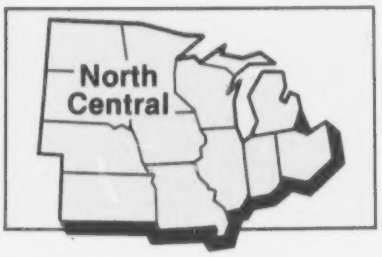
## *Product movement*

*...continued*

mowers, riding mowers/lawn tractors and gas spin trimmers.

All nine catagories showed growth except electric spin trimmers, where more retailers showed sale decreases than increases. Overall, the Northeast tended to do better than the national sales trends.

- **Garden tools:** 48 percent carry the line; 16 percent said sales were up; 26 percent said same and 6 percent said down;
- **Watering equipment:** 47 percent carry the line; 14 percent said sales were up; 26 percent said same and 7 percent said down;
- **Rodenticides:** 33 percent carry the line; 4 percent said sales were up; 28 percent said same and 2 percent said down;
- **Herbicides:** 40 percent carry the line; 14 percent said sales were up; 23 percent said same and 3 percent said down;
- **Insecticides:** 47 percent carry the line; 19 percent said sales were up; 21 percent said same and 7 percent said down;
- **Walk-behind mowers:** 72 percent carry the line; 37 percent said sales were up; 21 said same and 14 percent said down;
- **Riding mowers/lawn tractors:** 63 percent carry the line; 35 percent said sales were up; 23 percent said same and 5 percent said down;
- **Electric spin trimmers:** 47 percent carry the line; 9 percent said sales were up; 26 percent said same and 12 percent said down;
- **Gas spin trimmers:** 70 percent carry the line; 35 percent said sales were up; 23 percent said same and 12 percent said down.




In the North Central region, unlike nationally, watering equipment sales showed a downward trend. However, all other categories showed a stable or an increased growth. Most notably these increases occurred in insecticides and power equipment.

- **Garden tools:** 56 percent carry the line; 14 percent said sales were up; 32 percent said same and 10 percent said down;
- **Watering equipment:** 43 percent carry the line; 10 percent said sales were up; 17 percent said same and 16 percent said down;
- **Rodenticides:** 35 percent carry the line; 11 percent said sales were up; 23 percent said same and 1 percent said down;
- **Herbicides:** 40 percent carry the line; 15 percent said sales were up; 22 percent said same and 3 percent said down;
- **Insecticides:** 42 percent carry the line; 21 percent said sales were up; 19 percent said same and 2 percent said down;
- **Walk-behind mowers:** 71 percent carry the line; 29 percent said sales were up; 32 said same and 10 percent said down;
- **Riding mowers/lawn tractors:** 66 percent carry the line; 30 percent said sales were up; 21 percent said same and 15 percent said down;
- **Electric spin trimmers:** 51 percent carry the line; 13 percent said sales were up; 24 percent said same and 14 percent said down;
- **Gas spin trimmers:** 68 percent carry the line; 32 percent said sales were up; 27 percent said same and 9 percent said down.

Following the national trend, power equipment in the West fared well. More retailers there reported sales of walk-behind mowers, riding mowers/lawn tractors and gas-powered spin trimmers up than down. Of all nine categories measured, only electric spin trimmers were flat.

- **Garden tools:** 84 percent carry the line; 16 percent said sales were up; 57 percent said same and 11 percent said down;
- **Watering equipment:** 66 percent carry the line; 18 percent said sales were up; 32 percent said same and 16 percent said down;
- **Rodenticides:** 63 percent carry the line; 11 percent said sales were up; 45 percent said same and 7 percent said down;
- **Herbicides:** 63 percent carry the line; 25 percent said sales were up; 36 percent said same and 2 percent said down;
- **Insecticides:** 73 percent carry the line; 23 percent said sales were up; 36 percent said same and 14 percent said down;
- **Walk-behind mowers:** 72 percent carry the line; 34 percent said sales were up; 20 said same and 18 percent said down;
- **Riding mowers/lawn tractors:** 50 percent carry the line; 16 percent said sales were up; 27 percent said same and 7 percent said down;
- **Electric spin trimmers:** 63 percent carry the line; 11 percent said sales were up; 41 percent said same and 11 percent said down;
- **Gas spin trimmers:** 59 percent carry the line; 32 percent said sales were up; 18 percent said same and 9 percent said down.

The summer 1986 survey results were based on 262 responses from three categories of retailers: garden centers, hardware/home centers and power equipment dealers. Respondents were asked to compare sales of product categories in summer 1986 to summer 1985. As a result of rounding, percent of change does not always total the percent carrying the line.

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